



Hamilton/Burlington Society for the Prevention of Cruelty to Animals (HBSPCA)

Request for Proposal

Managed Services Provider

RFP Number: [RFP2026-ITMSP01](#)

Date of Issue: [September 1, 2026](#)

Proposal Due Date: [11:59pm on October 31st, 2026](#)

Contents

A. INVITATION AND GENERAL INFORMATION.....	3
A.1 Invitation to Proponents.....	3
A.2 Organization Overview	3
A.3 Proposal Submission Deadline.....	3
A.4 Inquiries and Communications	4
A.5 Proposal Delivery Requirements	4
A.6 Contract Term	4
A.7 Disclaimer	4
A.8 HBSPCA Partnership Investment Requirement.....	5
B. OBJECTIVES	5
C. PROPOSAL FORMAT REQUIREMENTS	6
D. SCOPE OF SERVICES	7
D.1 Help Desk and User Support.....	7
D.2 Microsoft 365 Administration.....	8
D.3 Onboarding and Offboarding.....	8
D.4 Device Lifecycle Management	9
D.5 Telephony Services	9
D.6 Backup and Recovery Operations	10
D.7 Business Application Coordination	10
D.8 Strategic Planning & Budgeting	11
D.9 Training and Documentation	11
D.10 Innovation Requirement.....	11
E. SECURITY AND COMPLIANCE REQUIREMENTS	12
F. VENDOR QUALIFICATIONS.....	12
G. TRANSITION REQUIREMENTS.....	13
H. EVALUATION CRITERIA.....	13
I. EVALUATION PROCESS	14
I.1 Evaluation Methodology.....	14
J. TIMELINE	14
K. NEGOTIATIONS AND AWARD	15
K.1 Negotiations.....	15
K.2 Contract Award	15

A. INVITATION AND GENERAL INFORMATION

A.1 Invitation to Proponents

The HBSPCA invites proposals from qualified and experienced Managed Services Providers (MSPs) to deliver comprehensive managed IT services and support.

The selected provider will be responsible for the proactive management, maintenance, monitoring, and support of the organization's IT infrastructure, systems, applications, cloud environments, and end-user technology. Services are expected to include service desk and technical support, network administration, server and endpoint management, Microsoft 365 administration, backup and recovery management, hardware and software asset management and integration support, patching and updates, performance monitoring, vendor coordination, and strategic IT planning. The successful MSP will demonstrate a proven ability to deliver reliable, responsive, and scalable IT services that support business operations, improve technology performance and availability, and enhance the overall user experience. This engagement is intended to establish a long-term partnership with a provider that can align technology services with organizational objectives while collaborating with the organization's cybersecurity service provider, who is responsible for 24/7/365 cybersecurity monitoring, threat detection, containment, incident response, and security governance services.

A.2 Organization Overview

The HBSPCA is a not-for-profit charitable animal welfare organization serving Hamilton, Burlington, and surrounding communities. The organization operates a primarily cloud-based technology environment centered on Microsoft 365 and supports a hybrid workforce, volunteers, donor management systems, animal shelter operations, veterinary services, telephony systems, and public-facing digital platforms.

The HBSPCA has adopted a governance model requiring independent operational IT support separate from security oversight and monitoring.

A.3 Proposal Submission Deadline

Proposals must be received no later than: **11:59pm on October 31st, 2026**

Late submissions will not be accepted.

A.4 Inquiries and Communications

All inquiries must be submitted by email to: **Shelley May, ExecProgramAsst@HBSPCA.com**

Questions must be received by: **11:59pm on October 15, 2026**

Responses will be issued to all registered proponents.

A.5 Proposal Delivery Requirements

Electronic submissions in PDF format are preferred.

Submit proposals to: **Shelley May, ExecProgramAsst@HBSPCA.com**

Subject Line: **RFP2026-ITMSP01**

A.6 Contract Term

The HBSPCA anticipates:

- **Three (3) year term, with annual performance reviews and the option for renewal by mutual agreement, with a 120-day notice period to cancel by either partner**
- **Start date: December 1, 2026 Transition Date (Start)**
- **Full Management: February 1, 2027**

The successful proponent shall be responsible for all transition activities and must implement the transition in a manner that minimizes operational impacts, with downtime limited to approved and acceptable levels.

A.7 Disclaimer

The HBSPCA reserves the right to:

- amend or cancel this RFP
- reject any or all proposals
- accept a proposal other than the lowest-priced submission
- request additional information from any proponent
- conduct interviews with shortlisted firms
- negotiate scope, fees, and contract terms

- award no contract if deemed appropriate

All costs incurred in preparing a proposal are the responsibility of the proponent.

All materials submitted become the property of the HBSPCA.

A.8 HBSPCA Partnership Investment Requirement

The successful proponent will be required to make an annual charitable contribution in support of the HBSPCA's **Unleash Love** campaign. As a community-based charitable organization, the HBSPCA seeks to develop partnerships with service providers who share its commitment to animal welfare and community impact. The required contribution will form part of the contractual agreement with the successful proponent and will be finalized during contract negotiations.

While this contribution is not an evaluation criterion and will not influence the assessment of proposals, proponents should acknowledge their willingness to support HBSPCA's mission and fundraising efforts as a valued community partner.

B. OBJECTIVES

The HBSPCA seeks a highly responsive, business-focused technology partner that:

- Enables productivity
 - Delivers exceptional customer service
 - Supports Microsoft 365 and cloud operations
 - Provides strategic advice
 - Maintains technology assets
 - Supports telephony and business applications
 - Identifies opportunities for innovation and efficiency
-

C. PROPOSAL FORMAT REQUIREMENTS

Proposals shall include:

Corporate Information

- Company profile
- Organization structure
- Key personnel

Service Delivery Model

- Help desk structure
- Escalation process
- Support hours
- Onsite support approach

Technical Capabilities

- Microsoft expertise
- Telephony experience
- Asset management methodology
- Documentation standards

Innovation Examples

- One example of a non-Microsoft solution recommended to a client
- One measurable business improvement delivered beyond traditional support services

Pricing

- Per-user pricing
 - Fixed monthly fees
 - Onboarding fees
 - Project rates
 - After-hours rates
 - Optional services
-

D. SCOPE OF SERVICES

D.1 Help Desk and User Support

- Unlimited remote support
- Onsite support
- End-user troubleshooting
- Executive support
- Hybrid work support
- Mobile device support

Service Hours

- Business hours support
- After-hours emergency support
- On-call escalation procedures

Required Service Levels

Priority	Response Target	Resolution Target
Critical	15 minutes	Vendor proposed
High	1 hour	Vendor proposed
Medium	4 hours	Vendor proposed
Low	1 business day	Vendor proposed

D.2 Microsoft 365 Administration

Vendor shall manage:

- Exchange Online
- Teams
- SharePoint Online
- OneDrive
- Intune
- Licensing administration
- User provisioning
- Group management
- Collaboration governance

Licensing Review

Within the first 90 days, conduct:

- Licensing assessment
- Nonprofit licensing optimization review
- Cost reduction opportunities

D.3 Onboarding and Offboarding

Develop and maintain a documented employee lifecycle process that includes the following:

Onboarding

- Account creation
- Licence assignment
- Device deployment
- Workspace setup
- Orientation support

Offboarding

- Same-day account disablement
- Access revocation
- Equipment recovery
- Documentation updates

D.4 Device Lifecycle Management

Vendor shall provide:

- Procurement assistance
- Device imaging
- Deployment
- Asset tracking
- Warranty administration
- Secure disposal
- Refresh planning

D.5 Telephony Services

Support the HBSPCA's:

- Microsoft Teams phone
- Contact Centre platform
- Auto attendants

- Call queues

Vendor shall manage:

- User provisioning
- Routing changes
- Reporting support
- Configuration management

D.6 Backup and Recovery Operations

Vendor shall provide:

- Microsoft 365 backup services
- Cloud backup services
- Recovery documentation
- Recovery testing

Requirements:

- Restore testing at least twice annually
- Executive reporting of results

D.7 Business Application Coordination

Provide support coordination for:

- Shelter management systems
- Donor management/CRM platforms
- Finance and accounting applications
- Payroll systems
- Shopify
- Webflow
- Veterinary applications

The MSP shall serve as the primary technology coordinator regardless of software ownership.

D.8 Strategic Planning & Budgeting

Vendor shall provide:

Annual Technology Plan

Including:

- Infrastructure roadmap
- Risk considerations
- Device refresh schedule
- Budget forecast

Quarterly Business Reviews

Delivered to:

- President & CEO and designated representatives

D.9 Training and Documentation

Services include:

- New hire technology training
- Microsoft 365 training
- End-user productivity training
- User guides
- Documentation maintenance

D.10 Innovation Requirement

Vendors shall provide:

- Minimum two improvement proposals annually
- Cost-saving opportunities
- Automation opportunities
- AI-enabled workflow recommendations

- Business process improvements

Vendors must include examples of previous innovation initiatives.

E. SECURITY AND COMPLIANCE REQUIREMENTS

The MSP shall:

- Comply with the security baseline established by the selected MDR provider
- Implement remediation items within agreed timelines
- Maintain least-privilege administration
- Support audit requests
- Provide complete administrative transparency

The MSP shall not:

- Own HBSPCA tenant credentials
- Maintain undisclosed administrative accounts
- Audit its own security controls

All systems, data, licensing, documentation, and credentials remain property of the HBSPCA.

F. VENDOR QUALIFICATIONS

Minimum requirements:

Microsoft

- Microsoft Solutions Partner for Modern Work
- Evidence of Microsoft 365 expertise
- Teams Voice capability considered an asset

Experience

- Five years managed services experience
- Experience supporting cloud-first organizations

- Experience supporting nonprofit organizations preferred

References

Provide:

- Three references
- Minimum two organizations with 40–150 users
- Minimum one nonprofit organization

G. TRANSITION REQUIREMENTS

The successful vendor shall support:

- Transition from incumbent provider
- Documentation review
- Credential inventory
- Administrative access verification
- Knowledge transfer
- Cutover activities

Transition plans shall be included in the proposal.

H. EVALUATION CRITERIA

Criteria	Weight
Service Delivery Model	25%
Microsoft 365 Expertise	15%
Telephony Experience	10%
Innovation Capability	15%
References & Experience	10%

Criteria	Weight
Transition Approach	10%
Reporting & Governance	5%
Cost	10%

I. EVALUATION PROCESS

I.1 Evaluation Methodology

The Evaluation Committee will include representatives from our Senior Management Team.

The Evaluation Committee may:

- review and score submissions
- interview shortlisted proponents
- conduct reference checks
- request clarification or supplemental information

J. TIMELINE

September 1, 2026	RFP released
October 31st, 2026	Applicant inquiry period concludes at 11:59pm. This period allows written contact with the HBSPCA to ask questions regarding the application and process. Questions may be submitted via email to Shelley May at ExecProgramAsst@hbspca.com. Emails should reference "RFP2026-ITMSP01 – Questions" in the subject line
November 5, 2026	Proposals due (emailed PDF preferred) by 11:59pm. Proposals submitted after this deadline will not be accepted
November 6-9, 2026	Evaluation team reviews and scores proposals and selects finalists
November 12-16, 2026	The HBSPCA will notify finalists by email. Finalist presentations will take place in-person or via Teams
November 19, 2026	Awarding of contract

K. NEGOTIATIONS AND AWARD

K.1 Negotiations

The HBSPCA reserves the right to negotiate with the preferred proponent regarding:

- scope of services
- fees
- staffing
- deliverables
- contract terms

Failure to reach mutually acceptable terms may result in negotiations with an alternate proponent.

K.2 Contract Award

No contractual relationship shall exist until a written agreement has been executed by both parties.
